

CHECKLIST FOR EVALUATION OF SUBCONTRACTING PLANS

PART I.

1. Contractor

Name: _____

Division or Plant: _____ Title: _____

Address: _____

Telephone: _____

2. Subcontracting Plan Administrator

Name: _____

Address: _____

Telephone: _____

3. Type of Solicitation

_____ Sealed Bid

_____ Negotiated

_____ BAA

17 thru 25 blank)

4. Type of Plan

_____ Individual

_____ Commercial Product

_____ Master Plan (If approved, leave

5. Place of contract performance:
Other.

_____ Same as (1).

6. Solicitation No. _____ Contract No. _____

7. Contract period _____ 8. Contract value: \$ _____

9. Description of contract items (supplies or services):

10. Contracting Officer

Name: _____

Address: _____

Telephone: _____

11. Administrative Contracting Officer

Name: _____

Address: _____

Telephone: _____

PART II.

12. Goals Established

“Planned Subcontracting”

Dollar Amount

Percent

a. Total planned subcontracting

\$ _____

b. Large Business (LB)

\$ _____

c. Small Business (SB)

\$ _____

d. Small disadvantaged business (SDB)
(subset 12.c)

\$ _____

HBCU/MI

\$ _____

Woman Owned SDB

\$ _____

e. Woman Owned SB (WOSB)

\$ _____

Does the Plan provide:
Acceptable

- | | |
|---|-----|
| 13. Acceptable goals? (If not, explain in remarks section) | Yes |
| No | |
| 14. Description of products and services to be subcontracted: | |
| a. Other than SB? | Yes |
| No ____ | |
| b. SB? | |
| Yes ____ No | |
| c. SDB including HBCU/MIs? | Yes |
| No | |
| d. WOSB? | Yes |
| No | |
| 15. Description of method used to develop goals? | Yes |
| No | |
| 16. Description of method used to locate potential sources? | Yes |
| No | |
| 17. For goal development purposes: | |
| a. Inclusion of indirect/overhead cost? | Yes |
| No | |
| b. If not included, rationale for not including | Yes |
| No | |
| c. Description of method used to allocate indirect/overhead costs? | Yes |
| No | |
| 18. The name and duties of the subcontract program administrator? | Yes |
| No | |
| 19. Description of contractor's efforts to assure subcontracting opportunities to SB, SDB, and WOSB concerns? | Yes |
| No | |
| 20. Flow down assurances, including: | |
| a. Appropriate subcontracting clauses will be used in subcontracting? | Yes |
| No | |
| b. Subcontractors will be required to adopt a similar plan? | Yes |
| No | |
| c. Subcontractors agreement to submit required reports? | Yes |
| No | |
| 21. Assurances contractor will submit SF 294 and 295 reports, other | |

- reports, as required, and cooperate in studies, surveys? Yes
No
22. Recitation of types of records maintained to show compliance with Plan? Yes
No
23. For the following types of records:
- a. SB, SDB, and WOSB source lists? Yes
No
- b. Efforts to identify and award subcontracts to SB, SDB, and WOSB firms? Yes
No
- c. Organizations contacted for SB, SDB, and WOSB sources, including:
- Contacts with SB, SDB, and WOSB associations? Yes
No
- Contacts with business development organizations? Yes
No
- Attendance at SB, SDB, and WOSB procurement conferences and trade fairs? Yes ____ No
- d. Records to support internal activities to guide buyers, including:
- Workshops, seminars, and training programs? Yes ____ No
- Monitoring activities to evaluate compliance? Yes
No
- e. On a contract-by-contract basis, records on all subcontract solicitations over \$100,000, indicating on each solicitation:
- Were small business solicited and if not, why not? Yes ____ No
- f. Records on a contract-by-contract basis to support award data, including name, address, and size status of each subcontractor? Yes
No
24. In order to effectively implement this plan to the extent consistent with efficient contract performance, the contractor shall perform the following functions:
- a. Assist SB, SDB, and WOSB firms to facilitate their participation? Yes
No
- b. Provide adequate and timely consideration of potential SB, SDB, and WOSB firms in make-or-buy decisions? Yes ____ No
- c. Counsel and discuss subcontracting opportunities with SB, SDB, and WOSB firms? Yes ____ No

25. Description of efforts encouraging the maximum practical opportunity for SB, SDB, and WOSB participation? Yes
No

26. Description of extent offeror plans to restrict competition to SDB, HBCUs and MIs? Yes
No
PART III.

27. Evaluation of the Contractor's past performance in awarding subcontracts for similar services? Yes
No

28. Is the Subcontracting Plan as submitted acceptable? Yes
No

29. If the plan is unacceptable, was the contractor notified of the deficiencies in writing? Yes
No

REMARKS:

Name _____ Title _____ Date _____